



Scottsdale Automotive Dealerships Market Analysis

A Market and Feasibility Study Outlining the
Viability of New Car Dealerships in Scottsdale

**November 2006
City of Scottsdale
Economic Vitality Department**

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TABLE OF CONTENTS

Executive Summary	5
Introduction	6
Scottsdale Resident Market	10
Scottsdale Employment Market	14
Regional Competition	17
Transportation Factors	27
Vehicle Sales & Registration	29
Appendix	33

INDEX

Map 1 (North Scottsdale Auto Dealers / Sites)	9
Map 2 (South Scottsdale Auto Dealers / Sites)	10
Table 1 (Population Growth)	12
Table 2 (Median Household Income)	12
Table 3 (Spending Potential Index for Scottsdale)	13
Table 4 (Scottsdale Employment by Industry & Year)	14
Table 5 (Largest Employers in Scottsdale)	15
Chart 1 (Job Growth, Labor Force Growth, Pop. Growth)	16
Chart 2 (Unemployment Rates)	16
Table 6 (Major Car Dealership Clusters: Metro Phoenix)	17
Map 3 (Metro Phoenix Auto Dealership Clusters)	18
Table 7 (Existing Metro Phoenix Car Dealers)	19
Table 8 (Top Automotive Dealer Performers in 2005)	23
Table 9 (Scottsdale Auto Dealership Ownership Patterns)	25
Table 10 (Traffic Counts)	27
Map 4 (Metro Area Freeway System)	28
Table 11 (New Vehicle Sales & Market Share by Mfg.)	30
Table 12 (Best Selling Luxury Vehicles in Metro Phoenix)	31
Table 13 (Motor Vehicle Registrations)	33
Table 14 (Scottsdale Sales Tax Receipts: Auto Category)	33
Table 15 (Scottsdale Total Gross Receipts: Auto Category)	33
North Scottsdale Market Area Analysis	35
South Scottsdale Market Area Analysis	39

EXECUTIVE SUMMARY

- ◇ The Phoenix metro area is a very dynamic market; it is growing rapidly, possesses a highly diversified economy, and has excellent prospects for the future.
- ◇ The City of Scottsdale is one of the most desirable areas within metro Phoenix, both for businesses and residents. With its high quality of life, high service levels and competitive costs, it attracts not only affluent residents and tourists, but also businesses looking for a higher-end location.
- ◇ The resident population base of the market area for the Auto Mall in North Scottsdale is rapidly growing; the estimated population, within a 10 mile radius, is 513,746. The projected population for 2011 is 576,847, a 12 percent increase, which indicates this area will continue to grow.
- ◇ The total number of people employed within the 10 mile radius of the North Auto Mall area is currently 236,284 employees, with an estimated average household income of \$97,104. The Scottsdale Airpark is currently home to nearly 2,500 businesses that employ over 50,000 people.
- ◇ The resident population base of the market area for the Motor Mile in south Scottsdale continues to grow; the estimated population, within a 10 mile radius, is 1,069,664. The projected population for 2008 is 1,160,293.
- ◇ Surface transportation improvements that are currently underway or which are planned will greatly enhance accessibility to the Scottsdale auto malls; the primary improvement is the Pima Freeway, which includes interchanges north and east of the north Auto Mall area.
- ◇ The automotive clusters closest in proximity to the Scottsdale market are the Northeast Phoenix, North Phoenix, and East Phoenix. This leaves auto dealers in Scottsdale with an excellent opportunity to serve the rapidly growing and affluent northeast Valley.
- ◇ The total number of people employed within the 10 mile radius of the Motor Mile is 714,049, with an estimated average household income of \$66,936.

INTRODUCTION

Automobile dealers traditionally have located near each other, creating strip commercial development along major arterial streets. By offering a wide variety of makes and models in one general area, these dealers tend to have a competitive advantage and greater sales potential; customers know that they will be able to compare different lines of cars without having to drive all over town. In addition, these areas tend to attract a variety of auto related services that support the dealer base in that area. Examples of this within the metro Phoenix area include the east Camelback corridor in Phoenix and the Motor Mile in the southern part of Scottsdale.

The concept of the auto mall carries this idea one step farther, and is seen, in varying forms, as the future of automobile retailing. The auto mall concentrates a number of dealers or brands on a single site, providing the opportunity, in many cases for a customer to park and walk to a number of dealerships. Auto malls have Covenants, Conditions and Restrictions (CC&Rs) regulating architecture, landscaping, etc., as well as joint marketing programs and other common services and amenities. All of this provides greater recognition and visibility for the center, and therefore attracts more customers. An example of this within the metro Phoenix area includes the Frank Lloyd Wright corridor in the northern part of Scottsdale.

This report includes six major sections. Part 1 is an overview of the metropolitan area, the City of Scottsdale and the auto mall market area. Part 2 examines the residential market, while Part 3 looks at the employment market in the Scottsdale area. Part 4 lists the existing regional competition to the auto mall in metro Phoenix. Part 5 outlines the transportation factors that make Scottsdale an excellent location. Part 6 looks at automobile sales statistics and registration trends.



Metro Phoenix Overview

The Phoenix metropolitan area is one of the most dynamic and growing areas in the country. Already the hub of the Southwest, metro Phoenix is rapidly becoming one of the nation's largest metropolitan areas. Driving this tremendous growth is a strong and diverse employment sector, with high-tech manufacturing and research, corporate headquarters, tourism and business/personal services as the basis for this strength. The following is a brief overview of some of the major developments occurring in the Phoenix area today:

- ◇ From 1995 to 2005 the metropolitan population grew 43 percent with an actual increase of approximately 1,096,780. The current population in the metro area is nearly 3.6 million.
- ◇ Over half of all of the Metro area manufacturing jobs are in high-tech industries. The 2005 unemployment rate for metro Phoenix was 4.0 percent.
- ◇ Tourism remains an important factor in the Phoenix metro area with over 13.3 million visitors in 2005. There are over 55,000 rooms available in Metro Phoenix, and that figure continues to increase.
- ◇ 23 major companies, with over \$578 million in capital investments, decided to relocate or expand their operations in the metro Phoenix area in 2005.
- ◇ Total retail sales in metro Phoenix in 2003 (the most recent data available) were \$33.1 billion.

Scottsdale Overview

Scottsdale is considered to be one of the most desirable areas within metropolitan Phoenix, from both a business and a residential viewpoint. The City of Scottsdale has one of the strongest local economies, with low taxes and excellent services. Still, Scottsdale remains strongly committed to maintaining a very high quality of life. Development standards are the strictest in the state.

Some specific characteristics that make Scottsdale a unique and desirable location include:

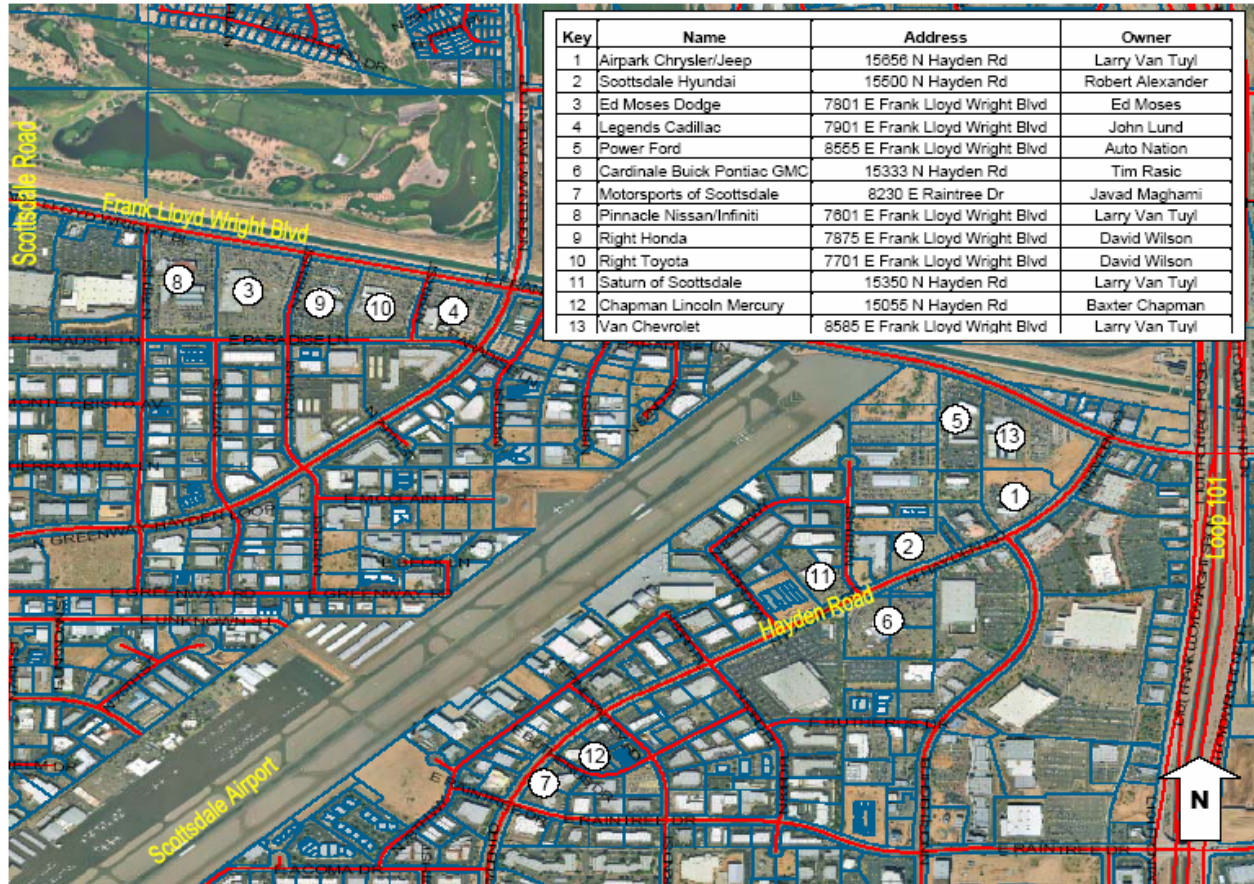
- ◇ Scottsdale's population growth rose 2.4 percent—to 226,390—in 2005. Scottsdale's overall median household income is among the highest in the Metro area at \$65,361.
- ◇ Retail sales have grown dramatically over the past ten years. Sales tax collections in Scottsdale have increased 224 percent over the past ten years.
- ◇ As a tourism destination, Scottsdale hosted 7.5 million visitors in 2005 with an economic impact of \$3.1 billion.
- ◇ Scottsdale issued 1,766 single-family housing permits in FY2005/06.

Market Area Maps

Map 1 (pg. 9) delineates the estimated market area for the North Scottsdale Auto Mall. This area includes a ten-mile radius from the Hayden and Frank Lloyd Wright Boulevard intersection. *Map 2* (pg. 10) outlines the estimated market area for the South Scottsdale “Motor Mile”. This area also includes a ten-mile radius extending from McDowell Road and 68th Street. These areas naturally overlap and share portions of market areas, but represent shorter drive times to each particular market area. Demographics for each market area are included in the *Appendix* (pg. 33).



Map 1 North Scottsdale Market Area



Map 2 South Scottsdale Market Area



SCOTTSDALE RESIDENT MARKET

The most important component of the overall demand for new car dealerships within a certain area is the resident base within that area. This part of the study looks at the residential market in the northeast Valley, both in terms of numbers and socioeconomic breakdowns.

Overall, the population of the Phoenix metro area grew by approximately 45 percent during the 1990's; up from 2 million in 1990, to 3.6 million in 2005. During the decade between 1995 and 2005, the City of Scottsdale grew nearly 35 percent. Significant growth (approximately 3.5 percent annually) continues. Scottsdale's population and the Metro area's population is expected to grow by 18.3 percent and 14 percent, respectively over the next five years.

Scottsdale's population has grown nearly 35 percent over the past decade.

The median household income level of Scottsdale residents is among the highest in the Valley — \$65,361, compared to approximately \$46,000 for the Metro area in 2005. These higher income households typically have greater disposable income, and, therefore, greater disposition toward new car purchases.

Overall, the population located within these markets is rapidly growing, and the residents tend to have high-income levels and excellent demographic characteristics that make them more likely to consider a new car purchase than any other population base in the Valley.

Table 1 (pg. 12) shows Scottsdale's population growth from 1995 through 2005. *Table 2* (pg. 12) shows the median household income of Scottsdale residents over the last decade. *Table 3* (pg. 13) illustrates the spending potential index for Scottsdale residents.

Table 1
Population Growth
1995 - 2005

	Scottsdale	Metro Area	N. Scottsdale Market Area*	S. Scottsdale Market Area**
1995	168,176	2,551,765	n/a	n/a
2000	202,705	2,862,909	418,147	996,799
2005	226,390	3,648,545	513,746	1,069,664
% Change 1995-2000	20.5%	12.2%	n/a	n/a
% Change 2000-2005	11.7%	27.4%	22.9%	7.3%
% Change 1995-2005	34.6%	42.9%	n/a	n/a

Source: U.S. Census Bureau, Maricopa Association of Governments

*North Scottsdale Market Area includes portions of NE Phoenix, Fountain Hills, & Paradise Valley.

**South Scottsdale Market Area includes portions of SE Phoenix, Tempe, & Mesa.

Table 2
Median Household Income
1995 - 2005

Year	Scottsdale	Metro Area	N. Scottsdale Market Area*	S. Scottsdale Market Area**
1995	\$48,319	\$35,623	n/a	n/a
2000	\$57,484	\$45,358	n/a	n/a
2005	\$65,361	\$46,111	\$97,104	\$66,936
% Change 1995-2000	19.0%	27.3%	n/a	n/a
% Change 2000-2005	13.7%	1.7%	n/a	n/a
% Change 1995-2005	35.3%	29.4%	n/a	n/a

Source: U.S. Census Bureau, Maricopa Association of Governments

*North Scottsdale Market Area includes portions of NE Phoenix, Fountain Hills, & Paradise Valley.

**South Scottsdale Market Area includes portions of SE Phoenix, Tempe, & Mesa.

Table 3
Spending Potential Index for Scottsdale
2005

Zip Code	Financial Services				The Home					Entertainment								Personal			
					Home Improvements		Furnishings														
	Auto Loan	Home Loan	Investments	Retire. Plans	Home Repair	Lawn & Garden	Computers & Hardware	Major Appliances	Electronics	Furniture	Restaurants	Sporting Goods	Fees & Tickets	Toys & Games	Travel	Cable TV	Apparel & Service	Auto Repairs	Health Ins.	Pets & Supplies	
85250	116	125	138	128	127	128	122	124	121	123	121	116	126	115	128	123	120	122	129	121	
85251	104	98	123	105	99	100	111	105	110	110	112	104	109	104	109	109	110	110	107	103	
85253	274	389	562	401	397	348	342	344	304	364	307	354	377	328	366	291	317	325	292	324	
85254	162	187	198	198	184	167	176	170	163	180	165	174	186	167	176	157	163	167	151	167	
85255	215	300	369	305	303	266	258	261	231	272	233	263	286	249	274	224	241	245	226	248	
85256	76	50	17	42	55	72	49	62	61	50	58	66	40	56	51	66	55	62	77	74	
85257	86	85	91	87	86	86	90	88	90	88	90	85	89	87	90	90	89	89	90	86	
85258	177	203	240	210	209	201	192	198	184	197	185	193	199	178	203	184	183	192	194	190	
85259	198	242	283	257	238	211	224	216	203	232	206	224	240	213	225	193	211	210	185	210	
85260	164	191	199	204	185	165	179	171	163	184	167	178	189	170	175	155	169	167	148	167	
85262	217	302	382	302	310	285	253	267	232	271	234	257	283	244	280	232	240	245	247	254	
Arizona	103	101	99	101	101	99	103	103	101	103	102	102	100	96	101	100	101	103	102	100	
U.S.	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	

Source: The Sourcebook of Zip Code Demographics, 2005

SCOTTSDALE EMPLOYMENT MARKET

The employment market in the northeast Valley is an important component to all car dealerships in the Scottsdale auto market. Not only do area employees represent potential vehicle sales, but they also provide a base for parts and service business.

The Scottsdale Airpark is the third largest employment center in metro Phoenix, and will continue to be a major force in the overall economy of the Valley in the years to come. Currently there are over 2,500 businesses employing 50,000 people within the Scottsdale Airpark.

Table 4 provides a breakdown of total Scottsdale employment by industry for 2000, and employment projections for 2010.

Table 5 (pg. 15) lists the 30 largest employers in Scottsdale in 2005. The businesses listed are technology companies, retailers, resorts, insurance companies, health care, education, and other service organizations.

Table 4
Scottsdale Employment by Industry and Year

	2000		2010	
	Employment	Percent	Employment	Percent
Agriculture	1,918	1.50%	2,225	1.40%
Business Services	26,848	20.90%	36,081	23.10%
Construction	7,077	5.50%	7,938	5.10%
Finance, Insurance, Real Estate	16,440	12.80%	18,141	11.60%
Health Industry	12,785	9.90%	14,934	9.60%
High Tech Manufacturing	8,138	6.30%	8,762	5.60%
Hospitality	14,652	11.40%	17,900	11.40%
Low Tech Manufacturing	2,985	2.30%	3,639	2.30%
Mining	122	0.10%	123	0.08%
Personal Services	8,446	6.60%	10,600	6.80%
Retail Trade	18,725	14.50%	23,507	15.00%
Transport	3,842	3.00%	4,038	2.60%
Wholesale Trade	6,674	5.20%	8,378	5.40%
TOTAL	128,652	100.00%	156,267	100.00%

Source: Gruen Gruen & Associates, "Analysis & Forecast of the Economic Base of Scottsdale," June 1999

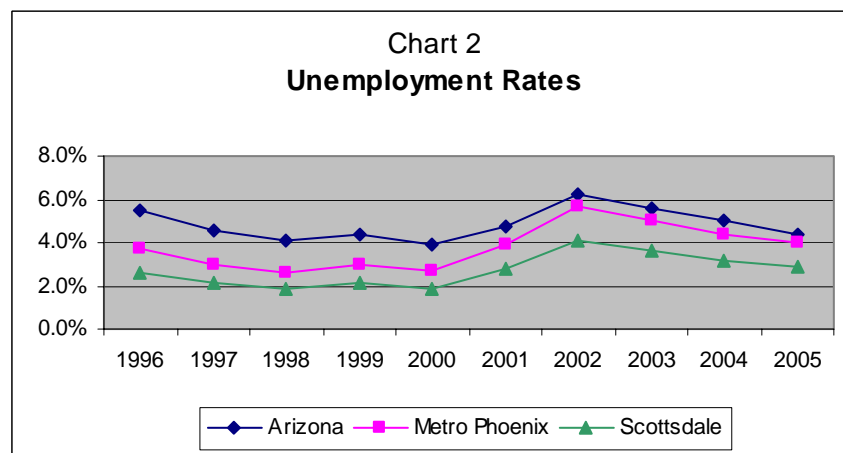
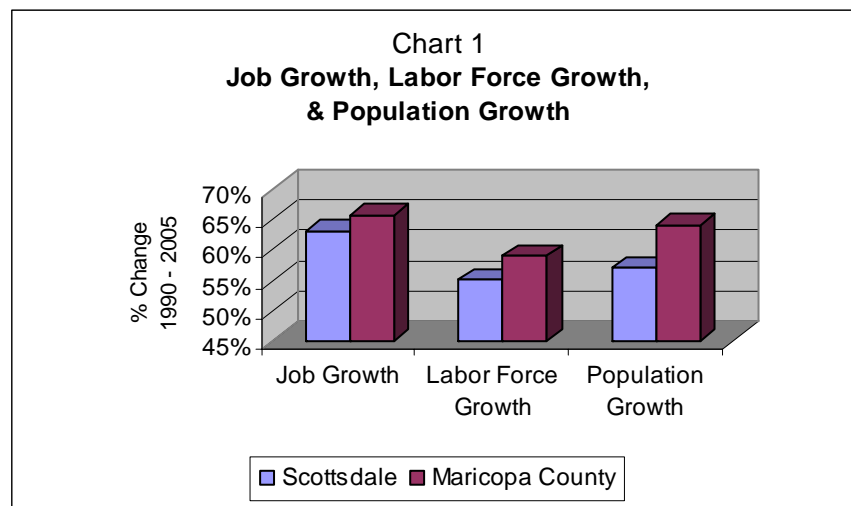
Table 4
Largest Employers in Scottsdale
 2005

Rank	Company Name	Employees
1	Scottsdale Healthcare	4,400
2	General Dynamics	4,000
3	Mayo Clinic - Scottsdale	3,995
4	Scottsdale Unified School District	3,500
5	City of Scottsdale	2,708
6	Scottsdale Insurance Company	2,000
7	CareMark	1,636
8	Fairmont Princess Resort	1,200
9	DMB Associates	1,100
10	Rural Metro Corporation	875
11	McKesson	700
12	The Boulders Resort	680
13	USPS - Scottsdale	680
14	Dial Corporation	650
15	JDA Software Group	650
16	Desert Mountain Properties	638
17	First Health Group	610
18	Go Daddy	600
19	Pegasus Solutions	600
20	E-Telecare Global Solutions	600
21	First National Bank of Arizona	530
22	Nordstroms	525
23	Hyatt Regency at Gainey Ranch	500
24	United Blood Services	498
25	Scottsdale Conference Resort	400
26	Scottsdale Community College	400
27	Dillards	390
28	Scottsdale Plaza Resort	375
29	DHL	350
30	Costco	350

Source: City of Scottsdale, Economic Vitality Department

Chart 1 compares job growth to labor force growth to population growth for metro Phoenix and Scottsdale. Between 1995 and 2005 the total number of jobs in the Metro area grew by 36 percent. There are currently over 236,284 jobs in the north Scottsdale market area, and over 714,049 in the south Scottsdale market area. Both labor force and population growth in the market areas are expected to be slower than the rate of job increase, so it appears that this area will become more important in terms of jobs over time.

Chart 2 provides an overview of unemployment rates for Scottsdale, metro Phoenix, and the State of Arizona since 1995. Between 1995 and 2005, Scottsdale's unemployment rate ranged between 4.6 percent and 1.9 percent. Scottsdale has paralleled the metro Phoenix and Arizona state rates, but at a significantly lower level. The unemployment rate for Scottsdale has consistently been about 30 percent lower than the rate for the entire metro Phoenix area, and about 40 percent lower than the rate for the State of Arizona.



REGIONAL COMPETITION

Currently there are 12 major new car dealership clusters serving the metro Phoenix area. These dealership clusters are shown in *Table 6*.

Information about the individual dealerships is included on *Maps 1, 2 and 3* (pgs. 9, 10, & 18) and in *Tables 7 through 9* (pgs. 19—25). The clusters closest in proximity to the Scottsdale market are the Northeast Phoenix, North Phoenix, and East Phoenix clusters. This leaves auto dealers in Scottsdale with an excellent opportunity to serve the rapidly growing and affluent northeast Valley.

Table 6
Major New Car Dealership Clusters: Metro Phoenix Area
2005

	Intersection/Area	# Dealerships	# Makes Represented
North Scottsdale	Frank Lloyd Wright Blvd. & Hayden Rd area	12	24
South Scottsdale	68th St. & McDowell Rd area (Motor Mile)	19	32
Northeast Phoenix	Scottsdale Rd & Loop 101 area	9	11
North Phoenix	Bell Rd & I-17 area	15	26
East Phoenix	12th St. & Camelback Rd area	11	15
Central Phoenix	Camelback Rd & I-17 area	7	10
Tempe	Warner Rd & I-10 area (Autoplex); Baseline Rd & Rural Rd area	13	21
Mesa/Apache Junction	Broadway Rd & Alma School Rd area; Main St & Mesa Dr. Area; Superstition Springs Rd & US Hwy 60 area	16	24
Chandler/Gilbert	Arizona Ave & US Hwy 60 area; Ray Rd & I-10 area	5	8
Peoria	Bell Rd & Loop 101 area	12	16
Glendale	51st Ave & Glendale Rd area	9	11
West Valley	I-10 & West of 75th Ave area	8	11

Map 3
Metro Phoenix Auto Dealership Clusters

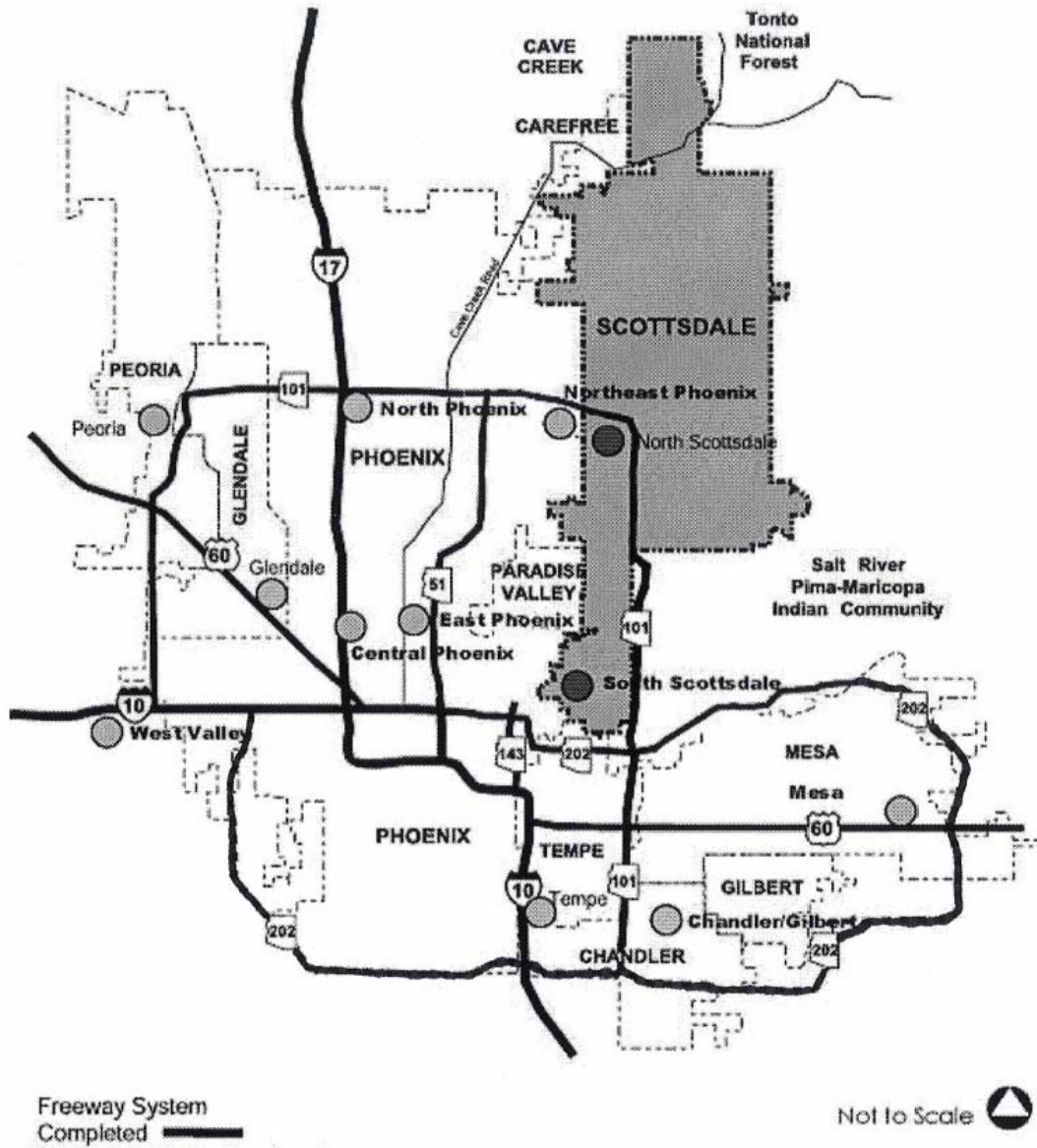


Table 7
Existing Metro Phoenix New Car Dealers
2005

NORTH SCOTTSDALE	Address	Make
Airpark Chrysler/Jeep	15656 N. Hayden Rd	Chrysler / Jeep
Cardinale Pontiac/GMC/Buick	15333 N. Hayden Rd	Pontiac / GMC / Buick
Chapman Lincoln Mercury	15055 N. Hayden Rd	Mercedes Benz
Ed Moses Dodge	7801 E. Frank Lloyd Wright Blvd	Dodge
Ledgends Cadillac	SEC Scottsdale Rd & Loop 101	Cadillac / Hummer
Motorsports of Scottsdale	8053 E. Raintree Dr	Aston-Martin / Bentley / BMW / Ferrari / Lamborghini / Mercedes Benz / Panoz / Porsche / Rolls Royce / Murcielago / Spyker
Pinnacle Nissan/Infiniti	7601 E. Frank Lloyd Wright Blvd	Nissan / Infiniti
Power Ford	8555 E. Frank Lloyd Wright Blvd	Ford
Right Honda	7875 E. Frank Lloyd Wright Blvd	Honda
Right Toyota	7701 E. Frank Lloyd Wright Blvd	Toyota
Saturn of Scottsdale	15350 N. Hayden Rd	Saturn
Schumacher European, Ltd	SWC Scottsdale Rd & Loop 101	Mercedes Benz
Scottsdale Hyundai	15500 N. Hayden Rd	Hyundai
Van Chevrolet	8585 E. Frank Lloyd Wright Blvd	Chevrolet

SOUTH SCOTTSDALE	Address	Make
Bill Heard Chevrolet	7227 E. McDowell Rd	Chevrolet
Chapman BMW/Dodge/	6601 E. McDowell Rd	BMW / Dodge / Volkswagen
Ferrari/Maserati Scottsdale	6825 E. McDowell Rd	Ferrari / Maserati
Five Star Ford	7100 E. McDowell Rd	Ford
Infiniti of Scottsdale	6420 E. McDowell Rd	Infiniti
Jaguar/Rolls Royce/Bentley/Land Rover/Aston Martin of Scottsdale	6725 E. McDowell Rd	Jaguar / Rolls Royce / Bentley / Land Rover / Aston Martin
Kachina Cadillac/Oldsmobile/Hummer/Saab	1200 N. Scottsdale Rd	Cadillac / Oldsmobile / Saab / Hummer
Mark Kia	1000 N. Scottsdale Rd	Kia
Mark Mitsubishi	6440 E. McDowell Rd	Mitsubishi
Nissan of Scottsdale	7000 E. McDowell Rd	Nissan
Power Buick/GMC/Pontiac	6640 E. McDowell Rd	Buick / GMC / Pontiac
Power Chrysler/Jeep/Eagle	6460 E. McDowell Rd	Chrysler / Jeep / Eagle
Power Isuzu/Hyundai	6480 E. McDowell Rd	Isuzu / Hyundai
Power Subaru	6420 E. McDowell Rd	Subaru
Powell Volvo	6500 E. McDowell Rd	Volvo
Scottsdale Audi	6855 E. McDowell Rd	Audi
Scott Toyota	6850 E. McDowell Rd	Toyota
Scottsdale Hummer	1101 N. Scottsdale Rd	Hummer
Scottsdale Lexus	6905 E. McDowell Rd	Lexus

Table 7 (Continued)

NORTHEAST PHOENIX	Address	Make
Acura N. Scottsdale	7007 E. Chauncey Ln	Acura
Audi N. Scottsdale	18088 N. Scottsdale Rd	Audi
BMW/Mini N. Scottsdale	18018 N. Scottsdale Rd	BMW / Mini
Jaguar/Aston-Martin N. Scottsdale	18118 N. Scottsdale Rd	Jaguar / Aston-Martin
Land Rover N. Scottsdale	18100 N. Scottsdale Rd	Land Rover / Range Rover
Lincoln/Mercury N. Scottsdale	7171 E. Chauncey Ln	Lincoln / Mercury
Porsche N. Scottsdale	18000 N. Scottsdale Rd	Porsche
Volkswagen N. Scottsdale	7001 E. Chauncey Ln	Volkswagen
Volvo N. Scottsdale	7111 E. Chauncey Ln	Volvo

NORTH PHOENIX	Address	Make
21 Bell Isuzu/Kia	2121 E. Bell Rd	Isuzu / Kia
21 Bell Subaru	2141 E. Bell Rd	Subaru
Bell Acura	1234 W. Bell Rd	Acura
Bell Ford	2401 W. Bell Rd	Ford
Bell Honda	701 W. Bell Rd	Honda
Bell Hyundai/Mazda/Mitsubishi/Suzuki	999 W. Bell Rd	Hyundai / Mazda / Mitsubishi / Suzuki
Bell Lexus	1901 W. Bell Rd	Lexus
Bell Road Toyota	2020 W. Bell Rd	Toyota
Lou Grubb Chrysler/Plymouth/Jeep	1645 W. Bell Rd	Chrysler / Plymouth / Jeep
Lou Grubb Dodge	16406 N. 26th Ave	Dodge
Lund Cadillac/Saab	1311 E. Bell Rd	Cadillac / Saab
Midway Chevrolet	2323 W. Bell Rd	Chevrolet
Midway Nissan/Infiniti	2233 W. Bell Rd	Nissan / Infiniti
Midway Pontiac/GMC/Buick	2233 W. Bell Rd	Pontiac / GMC / Buick
Sanderson Lincoln/Mercury	2121 W. Bell Rd	Lincoln / Mercury

EAST PHOENIX	Address	Make
ABC Nissan	1300 E. Camelback Rd	Nissan
Camelback Toyota	1333 E. Camelback Rd	Toyota
Camelback Volkswagen/Subaru	1499 E. Camelback Rd	Voldswagen / Subaru
Chapman BMW	1144 E. Camelback Rd	BMW
Chapman Lincoln/Mercury	1330 E. Camelback Rd	Lincoln / Mercury
Coulter Cadillac/Oldsmobile	1188 E. Camelback Rd	Cadillac / Oldsmobile
Courtesy Chevrolet	1233 E. Camelback Rd	Chevrolet
Mel Clayton Ford	1550 E. Camelback Rd	Ford
Showcase Honda	1400 E. Camelback Rd	Honda
Showcase Mazda	1521 E. Camelback Rd	Mazda
Showcase Pontiac/GMC	1331 E. Camelback Rd	Pontiac / GMC

Table 7 (Continued)

CENTRAL PHOENIX	Address	Make
Bill Luke Chrysler/Plymouth	2425 W. Camelback Rd	Chrysler / Plymouth
Bill Luke Dodge/Jeep	2331 W. Camelback Rd	Dodge / Jeep
Childress Automall	2223 W. Camelback Rd	Buick / Kia / Suzuki
Lou Grubb Chevrolet	2646 W. Camelback Rd	Chevrolet
Performance Dodge	4240 W. Glendale Ave	Dodge
Phoenix Motor Company	225 W. Indian School Rd	Mercedes Benz
Volvo on Camelback	2143 W. Camelback Rd	Volvo

TEMPE	Address	Make
Brown & Brown Nissan	7755 S. Autoplex Loop	Nissan
Chapman Chevrolet/Isuzu	1717 E. Baseline Rd	Chevrolet / Isuzu
Earnhardt Chrysler/Plymouth	577 E. Baseline Rd	Chrysler / Plymouth
Earnhardt Jeep/Suzuki	577 E. Baseline Rd	Jeep / Suzuki
Earnhardt Ford	777 E. Baseline Rd	Ford
Hyundai of Tempe	8050 S. Autoplex Loop	Hyundai
Saturn of Tempe	7799 S. Autoplex Loop	Saturn
Scottsdale Suzuki	707 N. Scottsdale Rd	Suzuki
Tempe Dodge/Kia	7975 S. Autoplex Loop	Dodge / Kia
Tempe Honda	7900 S. Autoplex Loop	Honda / Kia
Tempe Mitsubishi	8060 S. Autoplex Loop	Mitsubishi
Tempe Pontiac/GMC/Buick	7780 S. Autoplex Loop	Pontiac / GMC / Buick
Tempe Toyota	7970 S. Autoplex Loop	Toyota

MESA / APACHE JUNCTION	Address	Make
Berge Ford	460 E. Auto Center Dr	Ford
Berge Mazda/Volkswagen	1515 W. Broadway Rd	Mazda / Volkswagen
Big Two Oldsmobile	470 S. Alma School Rd	Oldsmobile
Big Two Oldsmobile/Mitsubishi	6222 E. Auto Park Dr	Oldsmobile / Mitsubishi
Big Two Toyota	1301 W. Broadway Rd	Toyota
Brown & Brown Chevrolet	145 E. Main St	Chevrolet
Brown & Brown Chevrolet	6330 E. Superstition Springs Blvd	Chevrolet
Brown & Brown Nissan Mesa	1701 W. Broadway Rd	Nissan
Coury Pontiac/GMC/Buick	6315 E. Auto Park Dr	Pontiac / GMC / Buick
Darner Chrysler/Jeep	837 W. Main St	Chrysler / Jeep
Earnhardt Superstition Ford	3400 S. Tomahawk Rd	Ford
Fiesta Lincoln/Mercury	1720 S. Mesa Dr	Lincoln / Mercury
Honda Cars of Mesa	1320 W. Broadway Rd	Honda
Sun Pontiac/GMC	1600 W. Main St	Pontiac / GMC
Superstition Springs Chrysler/Jeep	6130 Auto Park Dr	Chrysler / Jeep
Superstition Springs Toyota	6136 Auto Loop Dr	Toyota

Table 7 (Continued)

CHANDLER / GILBERT	Address	Make
Chapman Chevrolet	1150 N. 54th St	Chevrolet
Earnhardt Dodge/Hyundai/Kia	1301 N. Arizona Ave	Dodge / Hyundai / Kia
Earnhardt Ford/Mazda	7300 W. Orchid Ln	Ford / Mazda
Mercedes Benz of Chandler	7450 W. Orchid Ln	Mercedes Benz
Thorobred Chevrolet	2121 N Arizona Ave	Chevrolet

PEORIA	Address	Make
Arrowhead Honda	8380 W. Bell Rd	Honda
Biddulph Arrowhead	8424 W. Bell Rd	Isuzu / Oldsmobile
Larry Miller Dodge	8655 W. Bell Rd	Dodge
Larry Miller Hyundai	8633 W. Bell Rd	Hyundai
Larry Miller Toyota	8425 W. Bell Rd	Toyota
Liberty Buick	8737 W. Bell Rd	Buick
Lou Grubb Chevrolet Arrowhead	9055 W. Bell Rd	Chevrolet
Moore Chrysler/Plymouth/Jeep	8600 W. Bell Rd	Chrysler / Plymouth / Jeep
Peoria Kia	8660 W. Bell Rd	Kia
Peoria Pontiac/GMC	8860 W. Bell Rd	Pontiac / GMC
Saturn of Arrowhead	8801 W. Bell Rd	Saturn
Sunset Ford	9130 W. Bell Rd	Ford

GLENDALE	Address	Make
Earnhardt Honda/Volkswagen	4611 W. Glendale Ave	Honda / Volkswagen
Friendly Pontiac/GMC/Jeep	4510 W. Glendale Ave	Saturn
Glendale Mitsubishi	4434 W. Glendale Ave	Mitsubishi
Larry Miller Mazda	4701 W. Glendale Ave	Mazda
Mark Mitsubishi	4434 W. Glendale Ave	Mitsubishi
Sanderson Ford	6400 N. 51st Ave	Ford
Sands Chevrolet	5418 NW Grand Ave	Chevrolet
Sunland Lincoln/Mercury	4700 W. Glendale Ave	Lincoln / Mercury
West Valley Nissan	4850 W. Glendale Ave	Nissan

WEST VALLEY	Address	Make
Avondale Chrysler/Jeep	803 E. Van Buren (Avondale)	Chrysler / Jeep
Avondale Dodge	9901 W. Papago Fwy (Avondale)	Dodge
Avondale Mitsubishi/Suzuki	803 E. Van Buren (Avondale)	Mitsubishi / Suzuki
Gateway Chevrolet	9901 W. Papago Fwy (Avondale)	Chevrolet
Dan Grubb Ford	7501 W. McDowell Rd (Phoenix)	Ford
Pioneer Ford	13680 W. Test Drive (Goodyear)	Ford
Tom Jones Ford	23454 W. Hwy 85 (Buckeye)	Ford
West Valley Daewoo	15 W. Van Buren (Avondale)	Daewoo
Yates Pontiac/GMC	13845 W. Test Dr (Goodyear)	Pontiac / GMC

Table 8
Top Automotive Dealer Performers in 2005
 New Car Dealerships / New Retail Units Sold

Rank	Dealer	City	New Units Sold	Units Sold in 2005			Gross Sales (Millions)	Truck Sales as % of New Vehicles Sold	2005 Total # of:				2005
				2005	Retail	Wholesale	Total						
2005 2004			2004										CEO GM
1	Midway Chevrolet/Isuzu	Phoenix	5,891 6,328	2,166	3,908	6,074	\$264.0	68.0%	368	161	178		John Cleaves John Thomas
2	Camelback Toyota	Phoenix	4,880 5,101	2,213	2,198	4,411	\$194.5	43.0%	258	92	68		Larry Van Tuyl John O'Malley
3	Power Chrysler/JEEP/Dodge	Phoenix	4,631 2,896	2,280	2,477	4,757	\$208.0	89.0%	191	94	46		Todd Maul Lance Iserman
4	Courtesy Chevrolet	Phoenix	4,566 4,756	2,641	2,071	4,712	\$274.7	74.5%	370	94	86		William Gruwell
5	Midway Auto Team	Phoenix	4,443 4,756	1,868	3,126	4,994	\$292.3	39.0%	461	77	148		John Cleaves Glen Drobney
6	Brown & Brown Chevrolet, Inc	Mesa	4,383 5,007	2,595	1,874	4,469	\$267.8	85.0%	472	149	94		Steve Hanrahan Tim Brown
7	Earnhardt Ford Sales Company	Chandler	4,382 4,592	2,882	2,375	5,257	\$309.5	79.0%	441	133	235		Hal Earnhardt III Jon Nissen, Tim Hovik
8	Chapman Scottsdale	Scottsdale	4,084 4,339	1,322	1,234	2,556	\$256.2	38.0%	304	106	198		Eddie Davault Randy Scott
9	Pinnacle Nissan/Infiniti	Scottsdale	3,794 2,677	1,855	2,138	3,993	\$159.5	47.0%	263	76	71		Larry Van Tuyl Martin Peters
10	Chapman Chevrolet/ Isuzu	Tempe	3,657 1,464	2,519	2,390	4,909	\$192.5	80.0%	420	147	273		Eddie Davault Jesse McMahan
11	ABC Nissan	Phoenix	3,585 2,435	2,493	2,647	5,140	\$165.0	45.0%	256	78	53		Jay Carley, Jr
12	Earnhardt's Gilbert Dodge, Inc	Gilbert	3,506 3,694	2,622	2,546	5,168	\$158.0	71.0%	376	184	146		Hal Earnhardt III Ken Morley
13	Ford of North Scottsdale	Scottsdale	3,159 2,046	1,340	570	1,910	\$143.5	76.0%	202	40	66		George Athan
14	Superstition Springs Toyota	Mesa	2,950 2,804	399	0	399	\$79.0	WND	138	n/a	n/a		Anthony Merritt Scott Mackey
15	Van Chevrolet	Scottsdale	2,907 3,020	1,297	2,016	3,313	\$178.6	79.0%	264	68	76		Chuck Mullins

Table 8 (Continued)

Rank	Dealer	City	New Units Sold	Units Sold in 2005			Gross Sales (Millions)	Truck Sales as % of New Vehicles Sold	2005 Total # of:			2005
2005			2005				2005	2005	Employees	Sales Staff	Service Staff	CEO
2004			2004	Retail	Wholesale	Total						GM
16	Thorobred Chevrolet	Chandler	2,812	2,141	1,735	3,876	\$109.9	79.0%	235	58	99	Don Fehrenbach
17	Mel Clayton Ford	Phoenix	2,540	1,521	1,286	2,807	\$117.5	76.0%	198	60	50	Gerie Clayton
16			2,609									Neil Underwood
18	Earnhardt Honda	Avondale	2,297	1,649	1,210	2,859	\$81.8	41.0%	117	49	45	Hal Earnhardt III
20			2,287									Gray McDougal
19	Honda Cars of Mesa	Mesa	2,277	1,043	1,024	2,067	\$83.3	37.0%	180	36	49	Robert Thurston
17			2,354									Monte Yocum
20	Big Two Toyota	Mesa	1,922	818	971	1,789	\$74.7	51.0%	147	58	89	Chris Hoeye
20			1,707									R.W. Henkel
21	Earnhardt Chrysler/Jeep	Tempe	1,244	1,141	919	2,060	\$64.3	73.0%	115	48	55	Hal Earnhardt III
25			1,439									Mark Jones
22	Infiniti of Scottsdale	Scottsdale	1,100	525	672	1,197	\$70.0	WND	105	40	48	Ken Schatzberg
-			n/a									Mir Zodi
23	Superstition Springs Lexus	Scottsdale	851	209	n/a	209	\$48.0	0.0%	64	WND	WND	Anthony Merritt
-			n/a									Brent Larsen
24	Martin Buick/Pontiac/GMC	Apache Junction	668	364	228	592	\$35.8	80.0%	69	WND	WND	Martin del Castillo
-			n/a									Chad McDonald
25	Superstition Ford	Apache Junction	662	688	562	1,250	\$35.7	89.0%	60	25	27	Jim Babe Earnhardt
-			n/a									Bobby Delvecchio

Table 9
Scottsdale Auto Dealership Ownership Patterns
Status of South & North Auto Dealers: 2005

Make	South Scottsdale (Scottsdale/McDowell)	Ownership	North Scottsdale (Frank Lloyd Wright/Hayden)	Ownership
Acura			Acura N. Scottsdale**	United Auto Group
Aston Martin	Scottsdale Aston Martin	United Auto Group	Aston Martin N. Scottsdale	United Auto Group
Audi	Scottsdale Audi	United Auto Group	Audi N. Scottsdale**	United Auto Group
BMW	Chapman	Chapman	BMW N. Scottsdale**	United Auto Group
Buick	Power	Auto Nation	Lou Sobh	Lou Sobh Auto Network
Cadillac	Kachina	John Lund	Legends	John Lund
Chevrolet	Bill Heard	Bill Heard	Van	Larry Van Tuyl
Chrysler	Power	Auto Nation	Airport Chrysler / Jeep	Larry Van Tuyl
Daewoo				
Dodge	Chapman	Chapman	Ed Moses	Ed Moses
Ferrari / Maserati	Ferrari / Maserati Scottsdale	United Auto Group		
Ford	Five Star	Kenneth Scholz	Lou Grubb	Auto Nation
GMC	Power	Auto Nation	Lou Sobh	Lou Sobh Auto Network
Honda			Right	David Wilson
Hummer	Scottsdale Hummer	John Lund	Legends	John Lund
Hyundai	Power	Auto Nation		
Infiniti	Infiniti of Scottsdale	Larry Van Tuyl	Pinnacle	Larry Van Tuyl
Isuzu	Power	Auto Nation	21 Bell**	Bob Pitre
Jaguar	Scottsdale Jaguar	United Auto Group	Jaguar N. Scottsdale**	United Auto Group
Jeep	Power	Auto Nation	Airpark Chrysler / Jeep	Larry Van Tuyl
Kia	Kia of Scottsdale	Mark Debowy	21 Bell**	Bob Pitre
Lamborghini			Motorsports of Scottsdale	Javad Maghami
Land Rover	Land Rover of Scottsdale	United Auto Group	Land Rover N. Scottsdale**	United Auto Group
Lexus	Scottsdale Lexus	United Auto Group	Bell Lexus**	Berge Auto Group
Lincoln			Lincoln Mercury N. Scottsdale	Chapman

Table 9 (Continued)

Make	South Scottsdale (Scottsdale/McDowell)	Ownership	North Scottsdale (Frank Lloyd Wright/Hayden)	Ownership
Mazda				
Mercedes Benz			Motorsports of Scottsdale / Schumacher European	Schumacher European
Mercury			Lincoln Mercury N. Scottsdale**	United Auto Group
Mitsubishi	Mark	Mark Debowy		
Nissan	Nissan of Scottsdale	Berge Group	Pinnacle	Auto Nation
Oldsmobile				
Plymouth	Pitre	Auto Nation		
Pontiac	Pitre	Auto Nation	Lou Sobh	Lou Sobh Auto Network
Porsche			Motorsports of Scottsdale / Porsche N. Scottsdale**	United Auto Group
Rolls Royce / Bentley	Scottsdale Rolls Royce / Bentley	United Auto Group	Motorsports of Scottsdale	Javad Maghami
Saab	Kachina	John Lund	Legends	John Lund
Saturn			Saturn of Scottsdale	Larry Van Tuyl
Subaru	Pitre	Auto Nation	21 Bell**	Bob Pitre
Suzuki	Scottsdale Suzuki*	John Mallo		
Toyota	Scott	Larry Miller	Right	David Wilson
Volkswagen	Chapman	Chapman	Volkswagen N. Scottsdale**	United Auto Group
Volvo	Powell	Stan Powell	Volvo N. Scottsdale	United Auto Group

*Located in Tempe

**Located in Phoenix

TRANSPORTATION FACTORS

Traffic Counts

Table 10 shows average daily traffic counts, and 2020 estimated traffic counts for the North Scottsdale Auto Mall and the South Scottsdale Motor Mile.

Map 4 (pg. 28) depicts the metro Phoenix regional freeway system.

Table 10
Traffic Counts

North Scottsdale Auto Mall

Intersection	2000	2002	2004	2020
Frank Lloyd Wright (W. of Greenway/Hayden Loop) Blvd between Scottsdale Rd & Hayden Rd	46,000	53,400	36,800	39,000
Frank Lloyd Wright Blvd (E. of Greenway/Hayden Loop) between Scottsdale Rd & Hayden Rd	47,100	54,000	46,900	52,000
Scottsdale Rd (at Frank Lloyd Wright) between Butherus & Frank Lloyd Wright	47,900	40,200	49,600	57,000
Greenway/Hayden Loop (S. of Frank Lloyd Wright) between Scottsdale Rd & Frank Lloyd Wright Blvd	n/a	n/a	n/a	20,000
Pima Freeway between Scottsdale Rd & Frank Lloyd Wright Blvd	n/a	n/a	n/a	129,000

South Scottsdale Motor Mile

Intersection	2000	2002	2004	2020
McDowell Rd between 64th St & Miller Rd	122,200	97,800	107,300	138,000
Scottsdale Rd between Roosevelt & Oak	132,300	86,800	81,800	151,000

Source: Maricopa Association of Governments; City of Scottsdale

Map 4

Remaining Life Cycle Cost
(Millions) 2007 - 2008



- Grand Ave T/I Improvement Locations (Year open to traffic) :
 27th Ave/Thomas (03), 43rd Ave/Carnelback (04), 51st Ave/Bellthany Home (04),
 55th Ave/Maryland (04), **59th Ave/Glendale (06)**, 67th Ave/Northern (05),
 75th Ave/Olive (04) and 91st Ave Ramps @1011 (03)

Obligated construction cost, millions

* Corridor under Environmental Impact Statement / Design Concept Report

Note : This map does not include Proposition 400 projects. The South Mountain and Sky Harbor corridors funding are included in the RTP Freeway Program.

VEHICLE SALES & REGISTRATION

The following section examines sales and registration statistics on national, state and local levels. Although the new car industry was in a slump in the early 1990's, recent years have shown significant sales growth.

Table 11 (pg. 30) lists the number of car sales in the US during 2005 by make. *Table 12* (pg. 31) shows the best selling luxury vehicles in 2005 in Maricopa County. *Table 13* (pg. 33) gives an overview of motor vehicle registrations in metro Phoenix from 1996 to 2005 showing a 134 increase in passenger vehicles over a 10-year period. Metro Phoenix accounted for 73 percent of all passenger vehicle registrations and 58.3 percent of total vehicle registrations in Arizona in Fiscal Year 2005/06.

Table 14 (pg. 33) gives sales tax receipts in the “automotive” category for the City of Scottsdale. Total receipts have grown by 148 percent in the past 10 years. Even when this is discounted for inflation, the growth is still quite dramatic.

Table 15 (pg. 33) gives the total gross receipts in the “automotive” category for the City of Scottsdale. Scottsdale is becoming an increasingly important player in the new car sales arena, partly because of its strategic location within the Valley and partly because of the excellent demographics of its residents.



Table 11
New Vehicle Sales and Market Share by Manufacturer

Year	Daimler Chrysler	Ford	General Motors	Toyota	Honda	Nissan	Volkswagen	Other Imports	Total
2000	2,522,700 14.54%	4,147,700 23.91%	4,911,700 28.31%	1,619,200 9.33%	1,158,900 6.68%	752,800 4.34%	435,900 2.51%	1,800,800 10.38%	17,349,700
2001	2,273,200 13.10%	3,915,500 22.57%	4,852,500 27.97%	1,741,300 10.04%	1,207,600 6.96%	703,700 4.06%	438,900 2.53%	1,989,200 11.47%	17,121,900
2002	2,205,450 12.71%	3,576,250 20.61%	4,815,150 27.75%	1,756,150 10.12%	1,247,850 7.19%	739,850 4.26%	423,850 2.44%	2,052,950 11.83%	16,817,500
2003	2,313,464 14.60%	3,807,722 24.03%	4,716,050 28.35%	1,866,300 11.22%	1,349,850 8.11%	764,800 4.78%	389,100 2.34%	1,953,450 11.74%	17,160,736
2004	2,206,000 13.08%	3,271,100 19.39%	4,657,400 27.61%	2,060,050 12.21%	1,394,400 8.27%	855,000 5.07%	334,050 1.98%	2,088,500 12.38%	16,866,500
2005	2,304,900 13.60%	3,106,900 18.34%	4,456,800 26.30%	2,260,300 13.34%	1,462,500 8.63%	1,076,900 6.36%	307,250 1.81%	1,969,450 11.62%	16,945,000
Avg. 2000 - 2005	2,304,286 13.61%	3,637,529 21.48%	4,734,933 27.72%	1,883,883 9.21%	1,303,517 7.64%	815,508 4.81%	388,175 2.27%	1,975,725 11.57%	17,043,556

Source: N.A.D.A. Industry Analysis Division

Table 12
U.S. Best Selling Luxury Vehicles In Metro Phoenix
2005

Rank 2005 2004	Model	# of Sales 2004 2003	Local Dealerships
1 --	Lexus RX (SUV)	1,405 963	Bell Lexus, Scottsdale Lexus, Superstition Springs Lexus
2 2	Cadillac Escalade	1,375 1,059	Coulter Cadillac, Kachina Cadillac, Legends Cadillac, Lund Cadillac
3 1	Cadillac Deville	959 1,262	Coulter Cadillac, Kachina Cadillac, Legends Cadillac, Lund Cadillac
4 3	Lincoln Town Car	760 796	Chapman Lincoln, Fiesta Lincoln, Jack Ross Lincoln, Sanderson Lincoln, Sunland Lincoln
5 5	Acura MDX (SUV)	733 666	Acura N. Scottsdale
6 7	Lincoln Navigator (SUV)	726 617	Chapman Lincoln, Fiesta Lincoln, Jack Ross Lincoln, Sanderson Lincoln, Sunland Lincoln
7 4	Hummer 2 (SUV)	658 792	Scottsdale Hummer, Legends Hummer, Lund Hummer
8 9	BMW 5-Series	600 518	BMW North Scottsdale, Chapman BMW, Chapman BMW of Scottsdale
9 8	Mercedes-Benz E-Class	583 621	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
10 10	Infiniti FX (SUV)	561 471	Infiniti of Scottsdale, Pinnacle
11 14	Lexus GX470 (SUV)	528 330	Bell Lexus, Scottsdale Lexus, Superstition Springs Lexus
12 8	BMW X5 (SUV)	491 576	BMW North Scottsdale, Chapman BMW, Chapman BMW of Scottsdale
13 19	Lexus LS430	459 273	Bell Lexus, Scottsdale Lexus, Superstition Springs Lexus
14 --	Cadillac SRX (SUV)	375 10	Coulter Cadillac, Kachina Cadillac, Legends Cadillac, Lund Cadillac
15 11	Mercedes Benz M-Class (SUV)	339 457	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
16 --	BMW Z4	294 378	BMW North Scottsdale, Chapman BMW, Chapman BMW of Scottsdale
17 17	Lincoln Aviator (SUV)	279 284	Chapman Lincoln, Fiesta Lincoln, Jack Ross Lincoln, Sanderson Lincoln, Sunland Lincoln
18 22	Mercedes-Benz SL-Class	277 219	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
19 --	Porsche Cayenne (SUV)	272 165	Motorsports of Scottsdale, Porche North Scottsdale

Table 12 (Continued)

Rank 2005 2004	Model	# of Sales 2004 2003	Local Dealerships
20 15	BMW 7-Series	263 300	BMW North Scottsdale, Chapman BMW, Chapman BMW of Scottsdale
21 --	Land Rover Range Rover (SUV)	250 183	Land Rover Scottsdale, Land Rover North Scottsdale
22 20	Mercedes-Benz S-Class	248 265	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
23 --	Infiniti QX56 (SUV)	224 --	Infiniti of Scottsdale, Pinnacle
24 13	Jaguar S-Type	171 355	Scottsdale Jaguar, Jaguar North Scottsdale
24 --	Volvo S80	171 293	Powell Volvo, North Scottsdale Volvo

Source: Phoenix Business Journal, Book of Lists

Table 13
Motor Vehicle Registrations

Fiscal Year	Maricopa County				Arizona			
	Passenger Vehicles	% Change	Total Vehicles	% Change	Passenger Vehicles	% Change	Total Vehicles	% Change
1995/96	1,564,353	12.5%	1,932,731	11.2%	n/a	n/a	n/a	n/a
1996/97	1,685,833	7.7%	1,973,142	2.1%	n/a	n/a	n/a	n/a
1997/98	1,767,842	4.9%	2,264,856	14.7%	2,417,933	n/a	4,013,987	n/a
1998/99	1,870,388	5.8%	2,388,870	5.4%	2,541,135	5.1%	4,159,576	3.6%
1999/00	1,942,063	3.9%	2,484,835	4.0%	2,687,985	5.8%	4,407,098	6.0%
2000/01	1,999,033	2.9%	2,648,559	6.6%	2,768,362	3.0%	4,639,405	5.3%
2001/02	1,988,351	-0.5%	2,662,006	-0.5%	2,775,380	0.2%	5,118,115	10.3%
2002/03	2,048,527	3.0%	2,742,367	3.0%	2,875,468	3.6%	5,311,590	3.8%
2003/04	2,133,309	4.1%	2,870,961	4.7%	3,001,461	4.4%	5,638,799	6.2%
2004/05	2,279,723	6.9%	3,466,453	20.7%	3,133,485	4.4%	5,945,131	5.4%
2005/06	2,405,188	5.5%	3,682,234	6.2%	3,294,015	5.1%	6,318,402	6.3%

Source: Arizona Department of Transportation, Motor Vehicle Division

Table 14
Scottsdale Sales Tax Receipts
Automotive Category

Fiscal Year	Sales Tax Receipts	% Change
1999/00	\$18,433,581	22.0%
2000/01	\$20,227,975	10.0%
2001/02	\$20,750,352	2.0%
2002/03	\$20,411,289	-2.0%
2003/04	\$20,796,521	2.0%
2004/05	\$25,095,361	2.0%
2005/06	\$27,250,276	9.0%

Source: City of Scottsdale, Financial Services Dept.

Table 15
Scottsdale Total Gross Receipts
Automotive Category*

Fiscal Year	North	South
1999/00	\$1,170,065,386	\$1,238,476,673
2000/01	\$1,206,046,850	\$1,381,410,337
2001/02	\$1,213,310,902	\$1,372,234,459
2002/03	\$1,382,301,167	\$1,270,567,561
2003/04	\$1,485,164,365	\$1,314,403,861
2004/05	\$1,675,170,146	\$1,562,275,454
2005/06	\$1,626,039,574	\$1,366,757,465

Source: City of Scottsdale, Financial Services Dept.

*Includes sales of cars, motorcycles, boats, RV's, parts, repair service, automotive leases, car washes, and gasoline stations

APPENDIX

This section contains demographic analysis of the North Scottsdale and South Scottsdale market areas. The *North Scottsdale market area* (pg. 35) comprises a 10-mile radius around the intersection of Hayden Road and Frank Lloyd Wright Boulevard. The *South Scottsdale market area* (pg. 38) consists of a 10-mile radius surrounding the McDowell Road / 68th Street intersection. The data is derived from the 2000 U.S. Census.



North Scottsdale Auto Market Area
Scottsdale, Arizona

10.00 mi
radius

POPULATION	2006 Estimated Population	479,327
	2011 Projected Population	538,775
	2000 Census Population	418,123
	1990 Census Population	274,784
	Historical Annual Growth 1990 to 2006	4.7%
	Projected Annual Growth 2006 to 2011	2.5%
HOUSEHOLDS	2006 Est. Households	196,635
	2011 Proj. Households	221,588
	2000 Census Households	171,599
	1990 Census Households	110,449
	Historical Annual Growth 1990 to 2006	4.9%
	Projected Annual Growth 2006 to 2011	2.5%
AGE	2006 Est. Population 0 to 9 Years	13.3%
	2006 Est. Population 10 to 19 Years	12.7%
	2006 Est. Population 20 to 29 Years	10.9%
	2006 Est. Population 30 to 44 Years	23.2%
	2006 Est. Population 45 to 59 Years	22.6%
	2006 Est. Population 60 to 74 Years	11.9%
	2006 Est. Population 75 Years Plus	5.4%
	2006 Est. Median Age	38.2
MARITAL STATUS & SEX	2006 Est. Male Population	49.2%
	2006 Est. Female Population	50.8%
	2006 Est. Never Married	22.8%
	2006 Est. Now Married	57.3%
	2006 Est. Separated or Divorced	14.6%
	2006 Est. Widowed	5.3%
INCOME	2006 Est. HH Income \$200,000 or More	9.8%
	2006 Est. HH Income \$150,000 to 199,999	6.5%
	2006 Est. HH Income \$100,000 to 149,999	16.3%
	2006 Est. HH Income \$75,000 to 99,999	13.5%
	2006 Est. HH Income \$50,000 to 74,999	18.6%
	2006 Est. HH Income \$35,000 to 49,999	13.1%
	2006 Est. HH Income \$25,000 to 34,999	8.6%
	2006 Est. HH Income \$15,000 to 24,999	7.0%
	2006 Est. HH Income \$0 to 14,999	6.6%
	2006 Est. Average Household Income	\$ 98,062
	2006 Est. Median HH Income	\$ 79,732
	2006 Est. Per Capita Income	\$ 40,577
	2006 Est. Number of Businesses	20,296
	2006 Est. Total Number of Employees	224,611

This report was produced using data from private and government sources deemed to be reliable. The information herein is provided without representation or warranty.

North Scottsdale Auto Market Area

Scottsdale, Arizona

10.00 mi
radius

RACE	2006 Est. White Population	90.3%
	2006 Est. Black Population	1.5%
	2006 Est. Asian & Pacific Islander	2.8%
	2006 Est. American Indian & Alaska Native	1.0%
	2006 Est. Other Races Population	4.4%
HISPANIC	2006 Est. Hispanic Population	67,751
	2006 Est. Hispanic Population Percent	14.1%
	2011 Proj. Hispanic Population Percent	18.0%
	2000 Hispanic Population Percent	8.1%
EDUCATION (Adults 25 or Older)	2006 Est. Adult Population (25 Years or Older)	331,616
	2006 Est. Elementary (0 to 8)	2.6%
	2006 Est. Some High School (9 to 11)	3.8%
	2006 Est. High School Graduate (12)	21.3%
	2006 Est. Some College (13 to 16)	22.1%
	2006 Est. Associate Degree Only	9.0%
	2006 Est. Bachelor Degree Only	26.2%
	2006 Est. Graduate Degree	15.0%
HOUSING	2006 Est. Total Housing Units	217,943
	2006 Est. Owner Occupied Percent	66.3%
	2006 Est. Renter Occupied Percent	23.9%
	2006 Est. Vacant Housing Percent	9.8%
HOMES BUILT BY YEAR	2000 Homes Built 1999 to 2000	5.4%
	2000 Homes Built 1995 to 1998	18.6%
	2000 Homes Built 1990 to 1994	13.1%
	2000 Homes Built 1980 to 1989	29.5%
	2000 Homes Built 1970 to 1979	22.4%
	2000 Homes Built 1960 to 1969	7.7%
	2000 Homes Built 1950 to 1959	2.7%
	2000 Homes Built Before 1949	0.6%
HOME VALUES	2000 Home Value \$1,000,000 or More	2.4%
	2000 Home Value \$500,000 to \$999,999	7.8%
	2000 Home Value \$400,000 to \$499,999	5.6%
	2000 Home Value \$300,000 to \$399,999	10.9%
	2000 Home Value \$200,000 to \$299,999	23.0%
	2000 Home Value \$150,000 to \$199,999	21.0%
	2000 Home Value \$100,000 to \$149,999	20.6%
	2000 Home Value \$50,000 to \$99,999	8.3%
	2000 Home Value \$25,000 to \$49,999	0.4%
	2000 Home Value \$0 to \$24,999	0.1%
	2000 Median Home Value	\$ 246,395
	2000 Median Rent	\$ 762

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North Scottsdale Auto Market Area
Scottsdale, Arizona

**10.00 mi
radius**

LABOR FORCE	2006 Est. Labor: Population Age 16+	376,857
	2006 Est. Civilian Employed	65.8%
	2006 Est. Civilian Unemployed	2.0%
	2006 Est. in Armed Forces	0.0%
	2006 Est. not in Labor Force	32.2%
	2006 Labor Force: Males	48.6%
	2006 Labor Force: Females	51.4%
OCCUPATION	2000 Occupation: Population Age 16+	218,918
	2000 Mgmt, Business, & Financial Operations	22.2%
	2000 Professional and Related	23.0%
	2000 Service	11.5%
	2000 Sales and Office	31.6%
	2000 Farming, Fishing, and Forestry	0.1%
	2000 Construction, Extraction, & Maintenance	6.0%
	2000 Production, Transport, & Material Moving	5.5%
	2000 Percent White Collar Workers	76.8%
	2000 Percent Blue Collar Workers	23.2%
TRANSPORTATION TO WORK	2000 Drive to Work Alone	80.4%
	2000 Drive to Work in Carpool	9.4%
	2000 Travel to Work by Public Transportation	1.1%
	2000 Drive to Work on Motorcycle	0.3%
	2000 Walk or Bicycle to Work	1.7%
	2000 Other Means	0.8%
	2000 Work at Home	6.3%
TRAVEL TIME	2000 Travel to Work in 14 Minutes or Less	22.8%
	2000 Travel to Work in 15 to 29 Minutes	37.8%
	2000 Travel to Work in 30 to 59 Minutes	35.2%
	2000 Travel to Work in 60 Minutes or More	4.2%
	2000 Average Travel Time to Work	23.8
CONSUMER EXPENDITURE	2006 Est. Total Household Expenditure (in Millions)	\$ 13,547.0
	2006 Est. Apparel	\$ 198.8
	2006 Est. Contributions & Gifts	\$ 1,004.6
	2006 Est. Education & Reading	\$ 424.1
	2006 Est. Entertainment	\$ 792.9
	2006 Est. Food, Beverages & Tobacco	\$ 2,159.3
	2006 Est. Furnishings And Equipment	\$ 636.8
	2006 Est. Health Care & Insurance	\$ 936.9
	2006 Est. Household Operations & Shelter & Utilities	\$ 4,199.4
	2006 Est. Miscellaneous Expenses	\$ 226.7
	2006 Est. Personal Care	\$ 200.8
	2006 Est. Transportation	\$ 2,733.2

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South Scottsdale Auto Market Area
Scottsdale, Arizona

10.00 mi
radius

POPULATION	2006 Estimated Population	1,083,571
	2011 Projected Population	1,173,716
	2000 Census Population	996,759
	1990 Census Population	858,517
	Historical Annual Growth 1990 to 2006	1.6%
	Projected Annual Growth 2006 to 2011	1.7%
HOUSEHOLDS	2006 Est. Households	417,128
	2011 Proj. Households	453,274
	2000 Census Households	383,776
	1990 Census Households	337,076
	Historical Annual Growth 1990 to 2006	1.5%
	Projected Annual Growth 2006 to 2011	1.7%
AGE	2006 Est. Population 0 to 9 Years	14.9%
	2006 Est. Population 10 to 19 Years	14.2%
	2006 Est. Population 20 to 29 Years	16.9%
	2006 Est. Population 30 to 44 Years	21.8%
	2006 Est. Population 45 to 59 Years	17.9%
	2006 Est. Population 60 to 74 Years	9.3%
	2006 Est. Population 75 Years Plus	5.0%
	2006 Est. Median Age	32.7
MARITAL STATUS & SEX	2006 Est. Male Population	51.0%
	2006 Est. Female Population	49.0%
	2006 Est. Never Married	33.7%
	2006 Est. Now Married	43.1%
	2006 Est. Separated or Divorced	17.9%
	2006 Est. Widowed	5.3%
INCOME	2006 Est. HH Income \$200,000 or More	4.4%
	2006 Est. HH Income \$150,000 to 199,999	3.0%
	2006 Est. HH Income \$100,000 to 149,999	9.8%
	2006 Est. HH Income \$75,000 to 99,999	10.6%
	2006 Est. HH Income \$50,000 to 74,999	19.2%
	2006 Est. HH Income \$35,000 to 49,999	16.3%
	2006 Est. HH Income \$25,000 to 34,999	12.3%
	2006 Est. HH Income \$15,000 to 24,999	11.5%
	2006 Est. HH Income \$0 to 14,999	12.9%
	2006 Est. Average Household Income	\$ 66,418
	2006 Est. Median HH Income	\$ 54,372
	2006 Est. Per Capita Income	\$ 26,348
	2006 Est. Number of Businesses	53,855
	2006 Est. Total Number of Employees	728,269

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South Scottsdale Auto Market Area
Scottsdale, Arizona

10.00 mi
radius

RACE	2006 Est. White Population	76.5%
	2006 Est. Black Population	4.5%
	2006 Est. Asian & Pacific Islander	3.1%
	2006 Est. American Indian & Alaska Native	2.7%
	2006 Est. Other Races Population	13.2%
HISPANIC	2006 Est. Hispanic Population	366,047
	2006 Est. Hispanic Population Percent	33.8%
	2011 Proj. Hispanic Population Percent	36.8%
	2000 Hispanic Population Percent	28.1%
EDUCATION (Adults 25 or Older)	2006 Est. Adult Population (25 Years or Older)	674,456
	2006 Est. Elementary (0 to 8)	7.5%
	2006 Est. Some High School (9 to 11)	6.6%
	2006 Est. High School Graduate (12)	24.7%
	2006 Est. Some College (13 to 16)	21.6%
	2006 Est. Associate Degree Only	8.5%
	2006 Est. Bachelor Degree Only	19.2%
	2006 Est. Graduate Degree	11.9%
HOUSING	2006 Est. Total Housing Units	456,893
	2006 Est. Owner Occupied Percent	50.1%
	2006 Est. Renter Occupied Percent	41.2%
	2006 Est. Vacant Housing Percent	8.7%
HOMES BUILT BY YEAR	2000 Homes Built 1999 to 2000	2.2%
	2000 Homes Built 1995 to 1998	5.2%
	2000 Homes Built 1990 to 1994	6.0%
	2000 Homes Built 1980 to 1989	24.7%
	2000 Homes Built 1970 to 1979	27.7%
	2000 Homes Built 1960 to 1969	15.3%
	2000 Homes Built 1950 to 1959	12.3%
	2000 Homes Built Before 1949	6.6%
HOME VALUES	2000 Home Value \$1,000,000 or More	1.2%
	2000 Home Value \$500,000 to \$999,999	3.6%
	2000 Home Value \$400,000 to \$499,999	2.5%
	2000 Home Value \$300,000 to \$399,999	4.5%
	2000 Home Value \$200,000 to \$299,999	11.1%
	2000 Home Value \$150,000 to \$199,999	15.3%
	2000 Home Value \$100,000 to \$149,999	32.9%
	2000 Home Value \$50,000 to \$99,999	26.0%
	2000 Home Value \$25,000 to \$49,999	2.3%
	2000 Home Value \$0 to \$24,999	0.5%
	2000 Median Home Value	\$ 169,783
	2000 Median Rent	\$ 581

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South Scottsdale Auto Market Area
Scottsdale, Arizona

10.00 mi
radius

LABOR FORCE	2006 Est. Labor: Population Age 16+	833,251
	2006 Est. Civilian Employed	63.2%
	2006 Est. Civilian Unemployed	3.1%
	2006 Est. in Armed Forces	0.1%
	2006 Est. not in Labor Force	33.7%
	2006 Labor Force: Males	51.0%
	2006 Labor Force: Females	49.0%
OCCUPATION	2000 Occupation: Population Age 16+	489,730
	2000 Mgmt, Business, & Financial Operations	14.4%
	2000 Professional and Related	20.5%
	2000 Service	15.6%
	2000 Sales and Office	29.1%
	2000 Farming, Fishing, and Forestry	0.2%
	2000 Construction, Extraction, & Maintenance	9.7%
	2000 Production, Transport, & Material Moving	10.5%
	2000 Percent White Collar Workers	64.0%
	2000 Percent Blue Collar Workers	36.0%
TRANSPORTATION TO WORK	2000 Drive to Work Alone	72.7%
	2000 Drive to Work in Carpool	14.9%
	2000 Travel to Work by Public Transportation	3.0%
	2000 Drive to Work on Motorcycle	0.4%
	2000 Walk or Bicycle to Work	4.5%
	2000 Other Means	1.0%
	2000 Work at Home	3.5%
TRAVEL TIME	2000 Travel to Work in 14 Minutes or Less	28.3%
	2000 Travel to Work in 15 to 29 Minutes	42.7%
	2000 Travel to Work in 30 to 59 Minutes	24.8%
	2000 Travel to Work in 60 Minutes or More	4.3%
	2000 Average Travel Time to Work	21.4
CONSUMER EXPENDITURE	2006 Est. Total Household Expenditure (in Millions)	\$ 21,761.4
	2006 Est. Apparel	\$ 319.0
	2006 Est. Contributions & Gifts	\$ 1,462.8
	2006 Est. Education & Reading	\$ 626.9
	2006 Est. Entertainment	\$ 1,256.2
	2006 Est. Food, Beverages & Tobacco	\$ 3,600.9
	2006 Est. Furnishings And Equipment	\$ 980.7
	2006 Est. Health Care & Insurance	\$ 1,552.7
	2006 Est. Household Operations & Shelter & Utilities	\$ 6,735.4
	2006 Est. Miscellaneous Expenses	\$ 376.4
	2006 Est. Personal Care	\$ 326.5
	2006 Est. Transportation	\$ 4,466.7

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